

VISION™ CMS Training Reference Guide

Your training session may have been conducted on one of your sites Dev or Staging or Live

- To login, type your web address domain into a web browser and add (/admin)
 - Example: <http://dev7.visioninternet.com/Admin>
 - Use your username and password
- The CMS Basic Training session consists of these three objectives: Client will have
 - Ability to Navigate and Locate content on the CMS
 - Ability to Edit, Build, Save and Publish content within your Content Group
 - Ability to Organize content in the components so the content flows to the front-end widgets
- The Basic Agenda:
 - Dashboard and administration interface overview
 - Support Menu and Help buttons
 - Intro and overview of Homepage
 - Interior page overview
 - Site Content tab
 - Pages
 - How to find pages in the back end of the CMS
 - Adding, editing and deleting
 - Saving, Archiving and Publishing
 - Image Library- How to Upload
 - Document Central- How to Upload
 - Calendar- Overview of the component and how to Create an Event
 - News- Overview of the component and how to Create a News Story
 - Review of Concepts / Discussion

Reminders:

- Google Chrome is the preferred browser to use while editing content in the CMS
- “Site Preview” shows a functional “Preview of what your content would look like if it is in Published mode”
- To get a site visitor/user experience: Log out, or use an “Incognito” tab in Chrome: **ctrl + shift + N**
- A Basic User can edit content built by and for other users in their Content Group
- A Super User can build and edit content for any Content Group
- If you delete something, Super Users can restore it by locating it in the Trash
- The Image Library and Document Central are NOT filing cabinets
- Upload documents in a way that your site visitors would understand (folder, names, key words)
- When building content in many components -> Check in the “Show all options” purple banner for more settings
- In the settings tab, assign Tags – Categories, Departments that push your content to the correct pages
(keep in mind: widgets, eNotifications)

Glossary of Terms

Approval Cycle	The CMS allows a user to create or edit content, then pass it to another user for approval before it's published or live on the site. Once approved, it goes live. Approvals can be done in one step (that is, a content contributor can create or edit a piece of content and then also directly publish to show up on the front of the website) or in 2 or more steps. Workflow is part of the Approval Cycle, meaning a piece of edited content can also be rejected by an approver preventing the content from being published.
Category	Most content types (Calendar, News, etc.) can have its own set of categories, which can be created by a user with the proper permissions, and then can be applied to individual pieces of content (event, News article, etc.) for several purposes. Categories factor into 1) widget filters (constraints) and 2) which subscription lists receive certain eNotifications.
Component	A section of the CMS designed to manage each CONTENT TYPE respectively, such as Pages, Images, Documents, News, Events, Directories, Jobs, RFPs, and so on. When you want to add an event to a page, you must build the event in the Calendar Component under the Site Content drop down in the back end of the site.
Content Group	Every piece of content is built within a Content Group. This indicates which group of CMS users have oversight permissions, to edit, delete etc. Each Content Group can have a specified Workflow/Approval Cycle for publishing content too. Content Groups are generally a department title that designates what group of users can edit this content. Users can be built to have access to a single content group, or multiple, but a piece of content (a page, event, or news article) can only belong to a single Content Group.
Content Review	Most items of content can be given a review date (the Parks and Recreation Pool page must be reviewed 1x a year for updates to the monthly schedule) when a review date is applied the CMS will notify the designated user, within the CMS and optionally through email.
Content Type	For example: Pages, Images, Documents, News, Events, Jobs, RFPs, and so on.
Department	Often misused, this is a tag feature for filtering purposes. The department tags are universal across components unlike a Category tag which is specific to an individual component.
eNotifications	Site visitors can subscribe to email notifications for news, events, job posts, and RFPs based on available categories. After content is published a 15-30-minute period to make edits or cancel before automated distribution (emails sent). If it is January and you are publishing an event that will happen in March, the CMS will send the eNotification automatically 6 days in advance of said event unless scheduled otherwise.
Layout	The designated amount of sections to a page. These are options for building a new Page Template: One Column, Reverse Two Columns, Three Columns, Three Equal Columns, Two Columns, or Two Equal Columns. The Layout of a Page can't be changed.
Locked Content	A piece of content remains locked to a CMS user until it is sent forward in the Approval Cycle/ Publishing process. This prevents multiple users from opening a piece of content simultaneously. The content can be unlocked by either a Super User or the most recent editor of the content (the user it is locked to).
Main Navigation	The main menu consists of pages built and managed within the Pages component. If your CMS has an "Advanced Mega Menu" it is possible to nest various widgets in the Menu drop down.

VISION CMS Training Reference Guide

Publish/Expire Date

Any item of content can be automatically published to or expired from the front end of the site, based on dates assigned. Published date is when it goes live, expired is when it is removed from the front end and available only to CMS users.

Side Navigation

A box widget often placed on the left side of a page which displays the navigation name of other pages and subpages in the same menu.

Page Template

Each Page Template is used to build 1 or more Pages in the CMS. A CMS User with the proper Security Role or a Super User is able to Edit an existing or build a new Page Template in 2 different ways. There will be a number of default page template options CMS Users can use to build a new page. Page Templates are available to users based upon content group, and this access can be adjusted by editing the individual Page Template. The best Practice way of adjusting Page Templates is in the Configurations > Page Templates component.

Widget

Sections on the pages of the website contain various content blocks called widgets. These content blocks, or widgets, pull information from components in the back-end of the website to display it on the front-end website. They can be set to include specific posts. When creating or editing Page Templates, you will be able to create a custom combination of widgets to display different types of content, organized on the same page. Then that template is available for use throughout the site. Each site widget serves a different purpose and function, and many of them provide numerous settings that will customize the look and function to meet an individual need. To make changes to what is displayed in a widget you must > Edit the page where the Widget Exists > Select the White Wrench of the widget > Adjust the settings > Save and Publish.

Workflow

Set of steps or states (Workflow States) that are applied to a piece of content. These are linear steps that must be completed in order, and all steps must be completed for the content to go live on the website. As the content makes its way through the steps, it may be approved to go forward, or it may be rejected backwards to an earlier step.

Image Scaling – Use .jpg or .png

USE DESKTOP PHOTO EDITOR APPLICATION TO **SCALE IMAGES BEFORE UPLOADING** TO IMAGE LIBRARY

Content Area Widget	200-500px width – Consider the purpose of the picture *** When adding image to the Content Area- use % of Content Area instead of PX size***
Page Banner, Image Widget	One column page layout: 1024px width Two column page layout: 500-900px width Aspect ratio is flexible so decide and crop before uploading.
Photo Album	Minimum 640px width by 480px height; Maximum 1024x768px Aspect ratio: 4x3
Thumbnails, visionSocial (optional)	Facebook Large image dimensions – 600 x 315 Small image dimensions – 120 x 120 "Invalid Image" dimensions – less than 120 x 120
Customize text in the message composer, title and subtitle sections as well as switching to a new image.	Twitter Large image dimensions: 280 x 150 Small image dimensions: 120 x 120 "Invalid Image" dimensions: less than 120 x 120
Home Collage/Hero Image and Other Specific Need	1920px wide, height and width depend on your design If photos are meant to be viewed full size or downloaded, scale accordingly

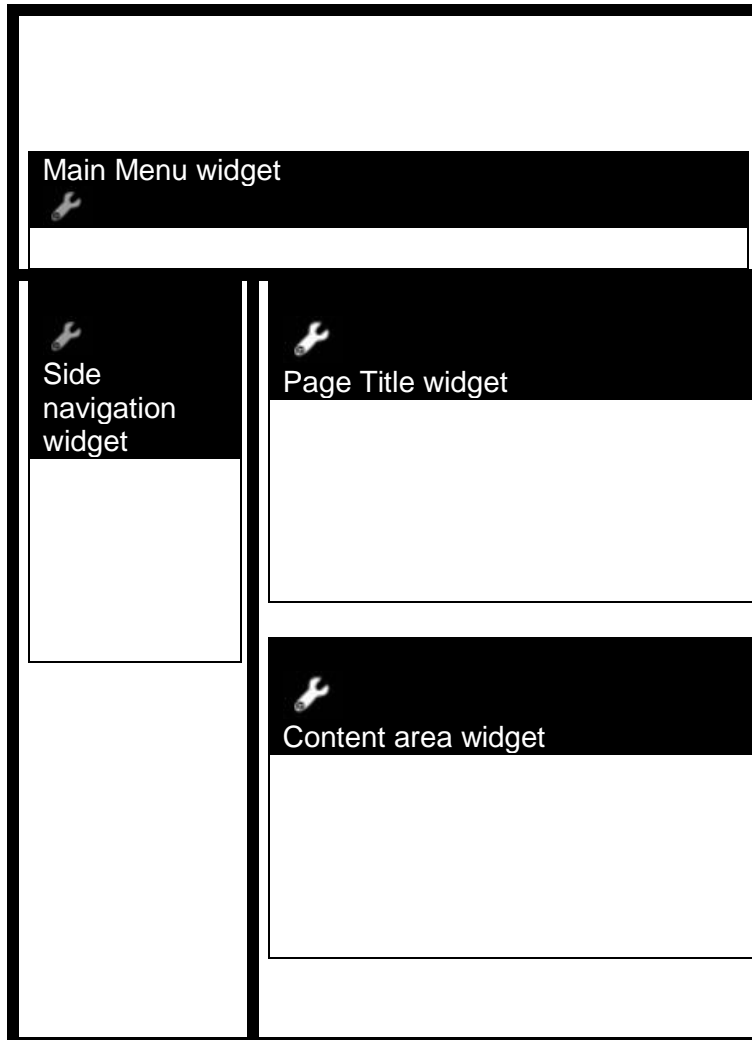
Steps to build a responsive and compliant data table:

- 1 Insert the table and add data; you may need to work with the generated table to adjust size
- 2 Right-click any cell and open Table Properties
- 3 On lower left column, for css class, on the dropdown menu, select: TableData
- 4
 - i. Click "Accessibility" tab, type number of heading row(s) and/or column(s);
 - ii. If necessary; Add a Caption about the table;
 - iii. Verify that "Associate cells with headers" box at bottom **is** selected;
 - iv. Click OK

Web Content Accessibility Guidelines (WCAG 2.0 AA)



- Your CMS framework is WCAG compliant, it is up to YOU to maintain compliant content
- The top 5 things that will cause your site to depreciate in a compliance spectrum:
 - Heading Styles
 - Use the proper order
 - Lists- Number Lists and Bullet Lists
 - Do not copy and paste lists from Word into your website
 - Data Tables
 - Build using the steps outlined above
 - Links
 - Link text should be the subject of where you will go or what you will do when you click the link
 - ALL DOCUMENTS AND THE CONTENT THEY CONTAIN MUST ALSO BE COMPLIANT
 - Images
 - Use Alternative Text (ALT Tag) A short description of what is occurring in the image
 - Icons/images with text- must have an accurate description of the text within the Alt Tag
- For examples, guidelines and updated information visit:
<https://www.w3.org/WAI/standards-guidelines/wcag/>

1. Most **Basic Page** Templates have 3 sections and 4 widgets built into it:
 - i. Main Menu
 - ii. Side Navigation
 - iii. Page Title
 - iv. Content Area



2. To change the content in a widget, click on wrench icon on right end of its title bar.

*Note: if the wrench is gray, the widget cannot be altered.

**Note: If you don't see the widgets, make sure you are in "Edit mode." You may need to click  (at the top, if on front end) or  (on purple bar, if on "Review mode" from back end)

 - a. If it's a Content Area widget, you will be able to enter text, images, links, etc. with the design text editor. You can also toggle to HTML if you need to place an embed code on the page.
 - b. If not a Content Area widget, there will be a variety of settings to customize which posts come from the components.

3. Beyond the Basic Page Template, if you want another type of content on your page, such as: news; events; job posts; an eNotifications sign-up; photo albums; or *any* of the other components (*i.e. Dashboard > Site Content >*), you can add a widget for any of those, BUT you have to use another template, NOT Basic Template. (You can swap templates later.) The other templates come with everything on the Basic + a widget for another component. For example: You want a photo album on your page... A Photo Album Template has all the basics widgets + Photo Album widget. If you want to further customize the combination of widgets on your page, you may need to build a Page Template to include those widgets you want; and swap your page or create your page with that template.

For specifications about scaling images before uploading, refer to “**Reference Guide: Image Scaling.**”

This guide explains:

- How to add an image to through the **Image Library** shortcut on the Toolbar of the Editor Tool;
- How to use **Image Properties** to change the way the appearance and layout of the image. You can adjust image display settings, such as dimensions, border, alignment, padding (space around it), border (optional), alt tag/text, etc.

Note: Thumbnails are designated from a separate selection field, not from within the Editor Tool.

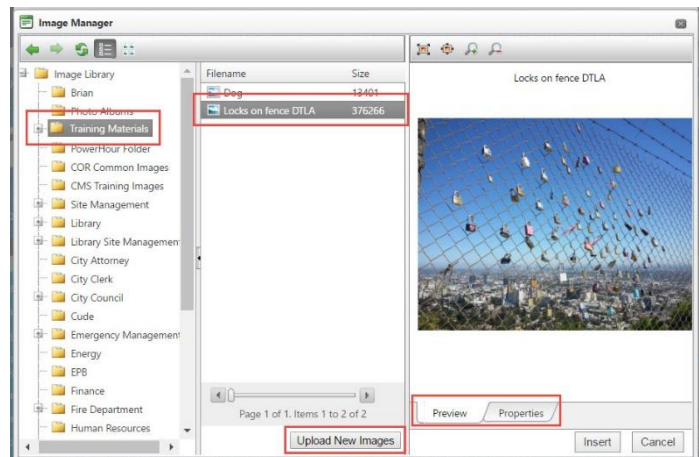
1. The Editor Tool is in one of two places, depending on the component / content type:
 - a. Pages component — open the **Content Area** widget (white wrench) to access the Editor Tool
 - b. Other components — the **Details** area is the Editor Tool.
2. *Note: wherever your cursor is placed in the Editor Tool is where the image will be placed.*



On the Toolbar, there is a tool called “**Image Library.**” It opens a box called **Image Manager.** This is a shortcut to the folders and files contained in the **Image Library** component.

3. On the left column, select the corresponding folder for your image.

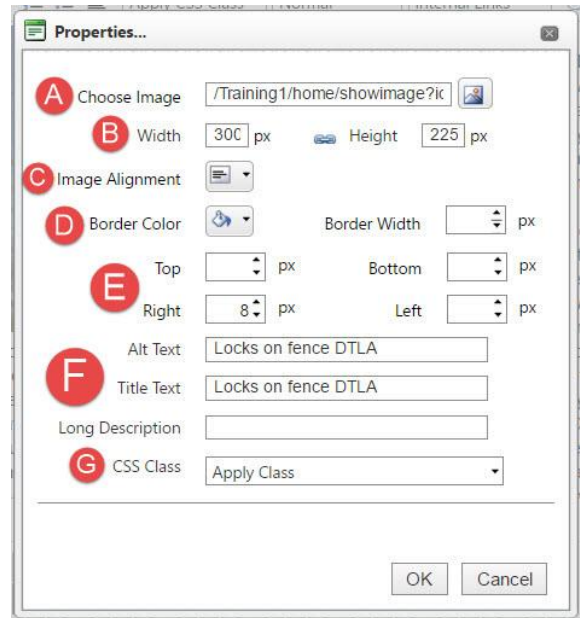
4. In the middle column, select the desired image already stored in that folder. If your image isn't there, you can directly upload an image from your computer to that folder, by clicking **Upload New Images.**



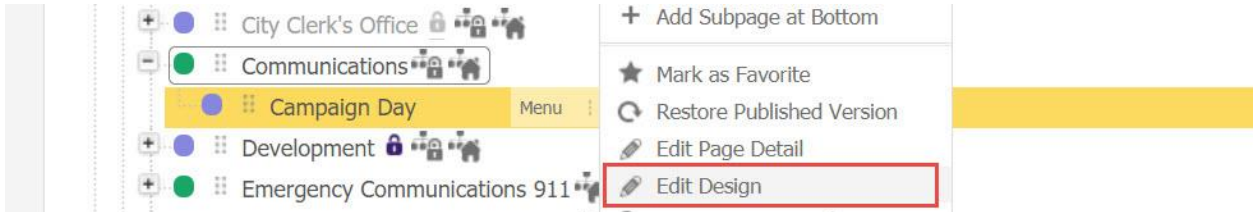
5. On the right column, there is a **Preview** of the image. (Sometimes browser variables cause this column to be blank. There's a workaround ahead on step 7.) If it is not blank, you can also switch the tab from **Preview** to **Properties**, where you can adjust the image immediately (details are below), or you can access the **Image Properties** as described in step 7.
6. When you click **Insert**, the image will be shown within the Editor Tool.
7. To access the **Image Properties** and adjust the image appearance, right-click on the image. [Right-click means use the right – not left – mouse button to click.]

The **Properties...** are:

- a. **Choose Image** – shows folder path within which image is contained in Image Library. If you need a different image, do not use this Image Library icon. Instead, cancel and delete this image, and start over, because changing the path here could force the properties as written to apply improperly to newly chosen image.
- b. **Width and Height** – set width size in % of Content Area space. Chain-link icon represents locking / retaining dimensions ratio.
- c. **Image Alignment** – click the box containing the tiny triangle to reveal and select from the five options for alignment. Text will automatically wrap around the image on the opposite sides of its alignment.
- d. **Border Color, Border Width** – options to build and display a border around the image. If you want a border, the width must be > 0px to display.
- e. **Top, Bottom, Right, Left** – refers to the padding of negative space between image and text.
- f. **Alt Text** – must be set for content accessibility. If the image has words in it-the words must be in the Alt Text as well. The Alt Text should be a short description of the image.
- g. **Title Text** – aka Tool Tip- not necessary for WCAG compliance
- h. **Long Description** – additional details indexed into search engine algorithms for search results. not necessary for WCAG compliance
- i. **CSS Class** – pre-set design styles can be applied for specific page elements. Generally, there is no need to apply a CSS Class on the image properties.



1. Find your page. Click in the yellow. On the Action Menu, select **Edit Page Design**.



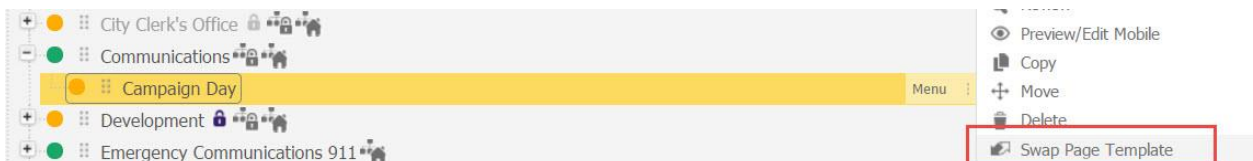
2. Open the Content Area widget – by clicking **the white wrench**.



3. Toggle the editor view from DESIGN to **HTML**.



4. Copy the entire HTML text. So as not to rely on the Clipboard (text recently copied and stored)... Paste into a plain text editor, like Windows Notepad. – NOT Microsoft Word, as it adds formatting. It's smart to save the .txt file, too, in case your computer shuts down spontaneously.
5. *Save or don't.* Return to the Pages component. Find your page. Click in the yellow. On the Action Menu, select **Swap Page Template**.



A reminder message appears:

Swapping page templates will delete the existing content on this page. Please be sure to backup any content you do not wish to lose before clicking continue.

Cancel

Continue

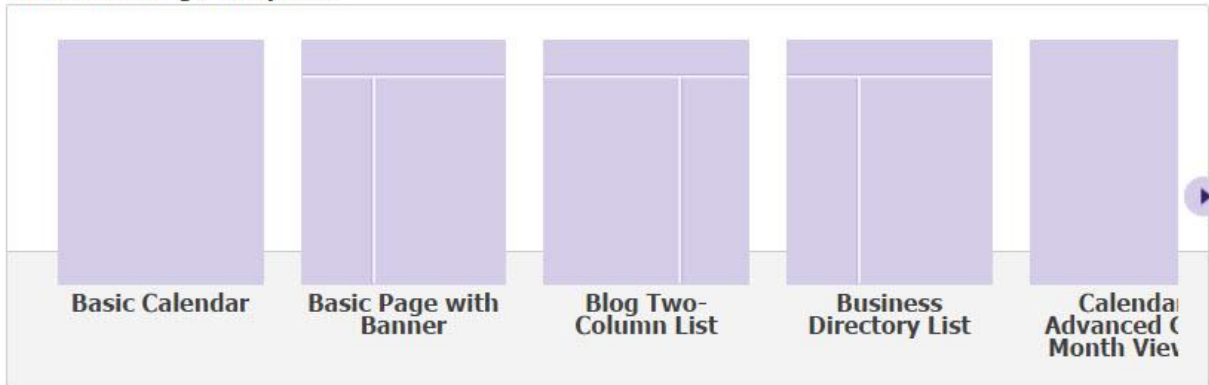
If you saved the HTML text, click **Continue**.

6. Choose the Page Template you want. Click **Save**.

Content Group: _Default

Current Page Template: Basic Page

Select New Page Template:



Cancel

Save

- On the Action Menu, select **Edit Page Design**.



- Open the Content Area widget – by clicking **the white wrench**.



- Toggle the editor view from DESIGN to **HTML**.



- Paste the copied HTML text into the text editor. Click **Save**.
- Complete your page. As available, click **Save**, **Save & Approve**, or **Save & Publish**.